

THE

Tobacco

1944 OUTLOOK ISSUE

SITUATION

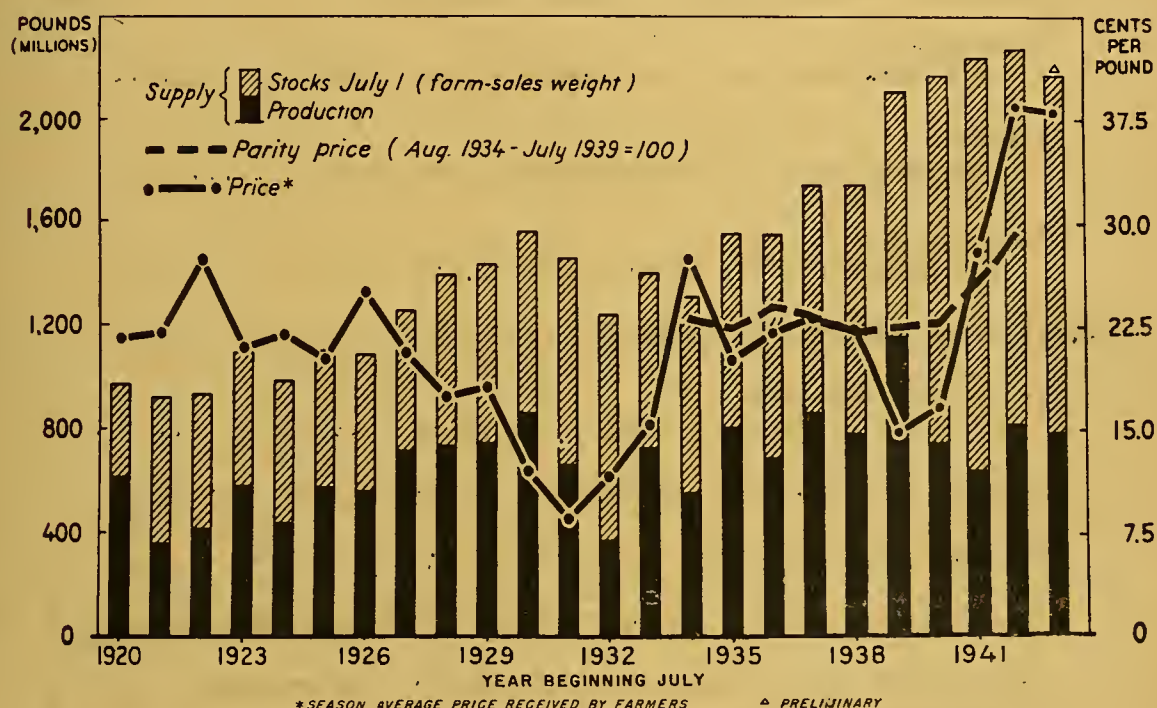
BUREAU OF AGRICULTURAL ECONOMICS
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Flue-cured Tobacco: Supply and Price in the United States, 1920-43



* SEASON AVERAGE PRICE RECEIVED BY FARMERS

▲ PRELIMINARY

U. S. DEPARTMENT OF AGRICULTURE

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The supply of flue-cured tobacco at the beginning of the season is somewhat lower than a year ago due to a slight reduction in the 1943 crop and to increased consumption of the leaf. The reduction of manufacturers' and dealers' stocks to the lowest level in several years is the result of increased domestic utilization, particularly cigarettes, substantial lend-lease shipments, and other exports. The season average farm price, this year and last, broke all records since 1919.

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THE TOBACCO SITUATION

Summary

On September 1 the indicated production of all tobacco in 1943 was 1,371 million pounds, 3 percent less than last year. Flue-cured production was placed at 778 million pounds compared with 812 million in 1942. Flue-cured disappearance in the crop year 1942-43 was the largest on record, due largely to the high level of domestic consumption, especially in the manufacture of cigarettes. Lend-lease shipments were considerably smaller than last year because of the promulgation of the policy of not supplying civilian needs under this arrangement. Civilian needs of United Nations areas were supplied by cash shipments. Flue-cured tobacco sold so far this season has averaged 38.3 cents per pound, just below the 1942 season average. A price ceiling of \$41 per 100 pounds (weighted average) was placed on flue-cured leaf effective July 27, 1943. This regulation was amended, effective August 12, to provide for a 3 cent per pound price differential between tobacco sold loose and that tied in hands. The order set a maximum weighted purchase price of 38 cents per pound for all flue-cured tobacco sold untied during the remainder of the season. Buyers were expected, however, to observe the over-all maximum average price of 41 cents per pound for their entire purchases of the 1943 crop.

The Commodity Credit Corporation will continue the loan and purchase program similar to the programs of the four preceding seasons. Under an international program for distribution of flue-cured tobacco, supplies of flue-cured have been allocated to the various Allied and neutral countries for the fiscal year ending June 30, 1944. Furthermore, restrictions have been placed on manufacturers' and dealers' purchases of the 1943 flue-cured crop.

The 1943 burley crop is expected to be 371 million pounds, 8 percent over last year. The present supply is estimated at about 1,061 million pounds -- somewhat lower than the average of the past three seasons. As in the case of flue-cured, some increase in disappearance is expected because of the increase in cigarette consumption. The Maryland crop is expected to be 17.5 million pounds -- somewhat more than half last year's production. Domestic disappearance during the calendar year 1944 is expected to be above the 1943 level. Because of the short crop and relatively large disappearance the supply is at the lowest level in several years.

Due to a smaller 1943 crop and increased domestic utilization of the leaf, the supply of fire-cured tobacco is below that of last year. Exports of the leaf are still relatively small. The dark air-cured production of 30.8 million pounds, as of September 1, is considerably below last year and less than disappearance in 1942.

Tax-paid withdrawals of cigarettes have shown increases for the fiscal year ended June 30, 1943, over the preceding year, while withdrawals of cigars declined 1.6 percent. Production of snuff during the first 6 months of 1943 was 3.5 percent above the corresponding period of 1942, but smoking tobacco declined approximately 12 percent. Plug chewing was up 12 percent.

United States foreign trade in tobacco continues to be dominated by war conditions, but the outlook for tobacco exports, lend-lease, and regular commercial shipments is somewhat more favorable than at this time last year.

-- September 30, 1943

FLUE-CURED, TYPES 11-14

Acreage, Production, and Income

On September 1 the indicated 1943 production of flue-cured tobacco was 778 million pounds, 33 million less than last year. Harvested acreage, as of July 1, was about 7 percent greater than in 1942. Lower yield per acre, however, due to adverse weather and perhaps to some extent to labor shortages, accounts for the smaller crop. Decline in per acre yield is most pronounced

for types 12 and 13, the 1943 average yield of which probably will be about 1,000 pounds as compared with 1,107 last year. The leaf is relatively light in these areas due to unfavorable weather.

Through September 25 the average price paid on flue-cured markets was 38.3 cents per pound, compared with an average of 38.4 cents received by growers for last season's crop. Prices this year and last are the highest since 1919 when the average for flue-cured reached 44.4 cents per pound.

Cash farm income from the 1943 crop is expected to reach 310 millions, about the same as last year. Some of the increase in income received by tobacco farmers in recent years has been absorbed by higher costs, particularly charge for hired labor. Tobacco in the flue-cured areas continues to be primarily a family enterprise and uses relatively little machinery. Nevertheless, the shortage of farm machinery and hired labor in the production of competitive crops has added to the problems of the tobacco farmer. The shortage of skilled labor and lack of certain fertilizer ingredients may be partly responsible for the fact that the quality of the 1943 crop is somewhat below that of the preceding year.

Prices received in 1943 for the flue-cured crop are expected to be well above parity. For tobacco, like agriculture as a whole, increases in prices paid by farmers and production costs in general have not kept pace with the upturn in tobacco prices since the outbreak of war. For example, between July 1939 and July 1943 the index of prices paid by farmers for commodities used in living and production, interest, and taxes (1934-39 = 100) rose from 96 to 135 or by 37 percent, whereas the average market price of flue-cured tobacco in 1943 is expected to be about 158 percent above 1939. But tobacco prices were unusually low in 1939, 14.9 cents. Moreover, wage rates continue to advance although other production costs, as measured by the United States index of prices paid by farmers, have been rising only slightly in recent months.

Table 1.- Flue-cured tobacco: Domestic supplies, disappearance, and season average price, average 1935-39, annual 1940-43 ^{1/}

Year	Production	Stocks, July 1	Total supply	Disappearance, year beginning July	Average price per pound
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Ct.
Average :					
1935-39 :	863.6	881.6	1,745.2	732.2	20.5
1940 :	759.9	1,409.7	2,169.6	576.7	16.4
1941 :	649.5	1,592.9	2,242.4	783.0	28.1
1942 :	811.7	1,459.5	2,271.2	2/ 892.4	38.4
1943 :	3/ 778.3	2/ 1,378.8	2/ 2,157.1		

^{1/} Farm-sales weight equivalent.

^{2/} The July 1, 1943, stocks, supply, and disappearance are not comparable with those of a year earlier due to a change in the method of reporting. As a result, disappearance was several million smaller than indicated above. See FDA Stocks Report of May 21, 1943.

^{3/} Indicated September 1.

OPA Maximum Price \$41 Per 100 Pounds

The Office of Price Administration control of prices of flue-cured tobacco entered the second season when Maximum Price Regulation 441 became effective July 27. At the time the regulation was issued the Administrator issued a statement of the considerations involved in the OPA decision. It was explained that control was made necessary, as had been the case in 1942, by the danger of a run-away market, which would have threatened the stabilization program, and in the long run would have been injurious to the growers. Moreover, it was stated that control was necessary to insure an adequate supply and efficient distribution of flue-cured tobacco to meet war and civilian needs.

Last season's leaf crop was placed under price regulation after a considerable amount of the crop had been sold. (Sales of type 14 were completed August 21.) During this period, demand for most all grades, particularly those of lower quality, was strong and prices were at the highest levels since 1919.

The 1943 order was similar to the 1942 regulation in that the \$41 maximum price was in terms of weighted seasonal averages, but this year's regulation differs in that all buyers have the same ceiling. It was intended that the auction system be maintained and that all buyers be on equal footing regardless of the extent or nature of their participation in the market during a particular period of the marketing season.

It became apparent early in the season that some differential was needed in the over-all ceiling to correspond to variations in methods of marketing practiced in the different flue-cured areas. In the past buyers have paid on the average at least 3 cents more per pound for tobacco produced in the Carolinas and Virginia and tied in hands than for similar quality leaf sold loose on the Georgia and Florida markets. This year, however, the pressure of prices against the belt-wide ceiling made profitable the trucking of tobacco from South Carolina to Georgia where it was sold untied and ungraded. This movement of tobacco from the State of origin became a serious problem in view of wartime transportation difficulties and labor shortages. As a result, OPA on August 12 announced an amendment to Regulation 441 which provided for a 3-cent per pound price differential between untied tobacco and tobacco tied in hands. The \$41 ceiling was not lifted, but instead the differential was established by reducing the maximum weighted average purchase price to \$38 for all flue-cured tobacco sold in the loose state, from the effective date of the order until the end of the season, which in that area was September 1. Since more than half of the crop was sold before the order was issued on August 12, the average price received by growers was only slightly changed. The order was successful however, in that hauling tobacco from the State of origin to Georgia was no longer profitable.

WFA Allocates Flue-Cured Supply Among
Domestic and Foreign Users

The Food Distribution Administration on June 29 adopted a plan of distribution of the United States supply of flue-cured tobacco for the fiscal year ending June 30, 1944. The plan provides for allocation of the total supply among domestic and foreign users as well as disposition of the 1943 crop

This program was implemented by Food Distribution Order No. 4.3 of August 14 which allocated purchases of the 1943 crop among domestic manufacturers and dealers.

Out of total allocations of the supply of 1,175.4 million pounds, 625.0 million were allocated for domestic uses, 217.5 for a contingency reserve, and 332.9 for exports and shipments. Cash sales to lend-lease countries for nonmilitary purposes accounts for approximately two-thirds of the total exports. Military requirements, which account for the remaining one-third, will be supplies through lend-lease.

Furthermore, the Administrator allocated the 1943 crop of flue-cured leaf (estimated at the time at 815 million pounds) among domestic and foreign users as follows: Manufacturers and dealers for domestic use 478.4 million pounds; for Government purchases for United Nations areas 119.0 million; and 217.4 million for a contingency reserve. Of the latter quantity approximately 180 million pounds are for Government purchases for future British needs, lend-lease and cash; 20 million pounds for contingencies; and the remainder for purchases by private dealers to replace stocks exported to other countries.

Limitations Placed on Manufacturers' and
Dealers' Consistent with FDA Allocations
of 1943 Crop

In order to carry out this plan of allocations the Food Distribution Administration issued Food Distribution Order 4.3, effective August 14 (about 2 weeks after the opening of the Georgia-Florida markets), which placed specific limitations upon the proportion of the 1943 flue-cured crop that could be purchased by any manufacturer or dealer. Specifically, the proportion of the 1943 crop which any manufacturer can acquire is "58 percent of the fraction of the total 1942 domestic usings of flue-cured tobacco that he used during the period July 1, 1942, through June 30, 1943." Included in the above percentage of leaf allowed is farm and auction warehouse scrap. Manufacturers are further restricted as to the share of the crop acquired either directly from growers at auction markets or from dealers. By each method he may acquire an amount proportional to his average purchases from the crops of 1939, 1940, 1941, and 1942.

Dealers, on the other hand, may share in that proportion of the crop not allocated to the Commodity Credit Corporation or the manufacturers. Of this remainder, approximately 17-1/2 percent of the crop, each dealer is allowed to acquire tobacco in the ratio of his average purchases during the 4-year period (1939-42) to total dealers' average purchases during that period. The share is exclusive of scrap tobacco.

Georgia-Florida Sales Completed with Record
Volume; Season's Average Price and
Returns Highest on Record

Georgia-Florida markets for type 14 opened July 27 with all grades in demand at prices considerably above the opening day of 1942. Throughout the

season, all grades sold at higher levels than during the previous year; largest proportional increases were for tobacco of poorer quality. Demand for these grades were weaker at the end of the season than at the beginning, however.

At the close of the selling season on September 1, sales were slightly more than 84 million pounds, an increase of 9 millions over 1942 and the highest on record. The average price received by growers was \$38.50 as compared with \$30.36 last year, up \$8.14 per 100 pounds. Returns to farmers as well as price per pound reached all-time highs for this area.

Prices for Inferior Grades Weaker on Border
Markets as Season Progressed

South Carolina and Border Belt markets (Type 13) opened August 5 with tobacco of all grades selling higher than last year. As the season progressed, however, definite weakness developed in the price structure for leaf of inferior quality, but the demand for tobacco of higher quality remained strong and prices were firm throughout the season. Most of the tobacco had been sold by September 25, sales amounting to 162 million pounds at an average price of 38.7 cents per pound. The 1943 crop will probably bring a record high return to growers of this area.

Eastern North Carolina Markets (Type 12)
Now Selling

Eastern North Carolina markets opened August 24 with all grades selling considerably higher than a year earlier, but somewhat below the opening week for similar leaf on the Georgia-Florida markets. Quality was somewhat below normal and the estimated crop of 289 million pounds is 6 million below last year. Total sales through September 25 amounted to 152 million pounds at an average price of 37.7 cents per pound.

Middle Belt (Type 11b) Prices Higher

The Middle Belt markets opened September 13 with prices for most all grades above those paid during the first week last year. Offerings were reported as below average in quality and volume relatively light. Sales through September 25 amounted to 17 million pounds at an average of 37 cents per pound.

Old Belt (Type 11a) Prices Higher

Old Belt in North Carolina and Virginia, opened for the 1943 season on September 20. During the first week of sales prices for many grades were higher than for the corresponding period last year. However, the general average was 38.9 cents per pound, compared with 39.8 for the corresponding period last season.

Supply Lower Than 1942; Disappearance
at Record Peak 1/

The supply of domestic flue-cured tobacco in the United States as of July 1, 1943, is estimated at 2,157 million pounds, which was below last year, but well above the average for the 5 years 1938-42. Indicated disappearance (domestic consumption and exports) totaled approximately 890 million pounds in 1941-42, compared with 783 millions in the previous year. Based on present rates of manufacturing and the outlook for exports, including lend-lease, this year's disappearance is expected to be still greater. On this basis, the supply is equivalent to only 26 months' disappearance, compared with 33 months a year earlier. Domestic consumption of flue-cured leaf is at a much higher rate than at any previous time. With this year's disappearance substantially greater than the season's indicated production of 778 million pounds, stocks on July 1, 1944 will be at the lowest level since the outbreak of the war.

Consumption of Cigarettes at High Levels

Cigarette consumption as indicated by tax-paid withdrawals in the first 8 months of 1943 was 9.11 percent larger than the corresponding period a year earlier. At this rate, consumption for the entire year will probably reach 247 billion, an increase of 5 percent over 1942. The actual increase over last year will be greater than is indicated by tax-paid withdrawals, due to the increased volume of tax-free cigarettes shipped to the armed forces overseas. During August, the 33d consecutive month to report an increase in cigarettes over the like month of the preceding year, almost 24 billion cigarettes were withdrawn.

Compared with a year earlier production of smoking tobacco decreased for the 6-month period ended June 30, 1943, but chewing tobacco and snuff increased. Cigar withdrawals showed a decrease as compared with a like period last year.

The rise in the use of snuff and chewing tobacco is explained in part by prohibition of smoking in war plants. However, changes in the purchasing power of individuals is reflected somewhat in the demand for different tobacco products and grades of the same product. In the present period of rising incomes the demand for higher priced brands of cigarettes and cigars is expanding, while the demand for economy brands and smoking tobacco is declining. During the past year certain of the cheaper brands of cigarettes have disappeared from the markets. Some of the apparent shift to more expensive products is due to the much higher prices paid by manufacturers for leaf tobacco which make the manufacture of low priced products relatively unprofitable.

1/ Data on supply and disappearance for July 1, 1943, are not comparable to previous years due to a change in the basis of reporting stocks.

BURLEY, TYPE 31

Large Crop Expected

Despite unfavorable weather during most of the growing season, burley is the only major type of tobacco to show an increase over 1942 production. The September 1 indications are for a burley crop of 371 million pounds, an increase of approximately 8 percent over last year. The total acreage of burley as of July 1 is larger than in 1942 by some 55,000 acres. Except in Tennessee and Alabama the yields per acre are expected to be below a year ago. The indicated production (September 1) is 917 pounds per acre contrasted with 979 last year, the lowest since 1940, but above the 838 average for 1935-39.

Table 2.- Burley tobacco: Domestic supplies, disappearance, and average price, average 1935-39, annual 1940-43 1/

Year	Production	Stocks, Oct. 1	Total supply	Disappearance: year beginning: Oct.	Average price per pound
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Ct.
Average					
1935-39 ..	315.9	673.6	989.5	317.4	22.2
1940	375.3	762.3	1,137.6	339.5	16.2
1941	336.8	798.1	1,134.9	379.6	29.2
1942	343.2	755.3	1,098.5	2/ 408.5	41.8
1943	3/ 371.3	2/ 690.0	2/ 1,061.3		

1/ Farm-sales weight equivalent.

2/ Estimated.

3/ Indicated September 1.

Demand and Consumption Increasing

Despite this season's relatively large crop, the estimated 1943 supply of burley tobacco will be the lowest since 1938. Disappearance for the 12-month period ended September 30, 1942, was 408 million pounds, 37 million in excess of the 1943 production. Consumption, on the other hand, is expected to continue on the upgrade. Stocks on October 1 are expected to be at the lowest point since 1937, and in relation to demand the lowest on record.

Unlike flue-cured tobacco, very little burley is exported. Cigarettes account for more than 50 percent of the entire consumption in normal years. Because there is some substituting between burley and flue-cured, the short crop and low inventories of the latter, together with the upward trend in cigarette consumption, will increase the demand for the 1943 crop of burley above even the high level of last year. Moreover, the demand for the leaf to be used in plug chewing tobacco will probably rise above last year. A continuation of the decline in consumption of smoking tobacco is in prospect

and will affect burley more than any other type of tobacco. It will be much more than offset, however, by the increase in cigarettes.

In view of the unprecedented demand for flue-cured and burley, stocks, within the next 2 years, may be reduced to the point where manufacturers will have difficulty in maintaining the customary blends from properly aged tobacco. From the standpoint of demand, an increase in 1944 production appears desirable. But burley growers, like farmers generally, will face the problem of greater production of food and fiber crops which will compete with tobacco for land and labor.

MARYLAND, TYPE 32

Due to the shortage of labor and the extensive and prolonged drought, the 1943 crop of Maryland tobacco will be the smallest since 1915 -- the year's production as indicated on September 1 being only 17.5 million pounds, somewhat more than half that of last year. Moreover, the estimated disappearance of 32 million pounds during the calendar year 1943 is an all-time record and will exceed the season's production by more than 16 million pounds. Likewise, stocks of the leaf in the hands of manufacturers and dealers are expected to be below last year and the lowest in relation to demand since systematic records have been kept. Exports of Maryland have been insignificant since the beginning of the present world conflict. Its domestic use is primarily in the manufacture of cigarettes, and the demand for the leaf has increased in proportion to the rise in the demand for that product.

Auction markets for this type of tobacco began selling the 1942 crop May 11, 1943, and closed for the season September 9. With an all-time record for prices paid farmers, total auction sales for the year were approximately 22.6 million pounds at an average price of \$56.28 per 100 pounds. This was an increase of \$25.95 over the previous year, and was the highest average prices ever paid for Maryland leaf. The volume of sales in these markets during the 1942 season (1941 crop) amounted to slightly more than 27 million pounds, with an average price of \$30.33 per 100 pounds. In addition to the sales on the auction markets, Baltimore sales through September 10 amounted to 2.8 million pounds. Combined sales on auction floors and Baltimore markets (to September 10) were 25.5 million pounds at an average price of roughly 56 cents, contrasted with 31 million pounds at an average of 32 cents for the entire season last year. There was no price ceiling on Maryland leaf. Total sales on both markets for the entire 1943 season is expected to reach 30 million pounds. On the auction markets this season, Maryland, like most other major types, showed the greatest percentage rise in prices for grades of lower quality.

Near the end of the season, according to the Food Distribution Administration, a considerable quantity of lower leaves from the 1943 crop was sold on auction floors at prices somewhat below those paid for the 1942 crop. This was the first time sales of the current season's crop have appeared on auction floors in any appreciable amount, according to the report of the above agency. This was probably in response to this season's high prices. It increased slightly the season's total sales of Maryland.

Table 3.- Maryland tobacco: Domestic supplies, disappearance, and season average price, average 1935-39, annual 1940-43 1/

Year	Production	Stocks Jan. 1 of following year	Total supply	Disappearance Jan. 1 of following year	Season average farm price per pound
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Ct.
Average					
1935-39 ...	28.9	38.4	67.3	27.9	20.4
1940	32.6	43.2	75.8	30.8	33.0
1941	31.2	45.0	76.2	28.5	30.1
1942	26.5	47.7	74.2	2/ 27.2	32.0
1943	3/ 17.8	2/ 47.0	2/ 64.8		

1/ Farm-sales weight equivalent.

2/ Estimated.

3/ Indicated September 1.

FIRE-CURED AND DARK AIR-CURED TOBACCO, TYPES 21-24 AND 35-37

Smaller Crop Result of Lower Yields;
Acreage Larger Than 1942

Although the 1943 acreage of fire-cured tobacco is slightly above that of 1942, the crop indicated September 1 at 64.3 million pounds is 8 percent below the 70 million pounds produced last season. The smaller crop is due to lower yields in all areas, Virginia in particular. The average of 854 pounds was almost 12 percent below the 968-pound average in 1942.

The 1943 crop situation in dark air-cured is similar to that of fire-cured. The acreage of 30,700 is 2 percent above 1942, but due to lower yields per acre the total production was 12 percent under last year. The indicated yield of 888 pounds is 14.2 percent below the 1,035 pounds obtained in 1942.

As in the case of burley and flue-cured, the 1943 acreage of dark tobaccos is below the acreage allotments. The fire-cured acreage as of July 1 was 75,300 acres compared with an estimated allotment of 77,000 acres. Similarly, dark air-cured acreage was 34,700 acres, compared with an allotment of 36,500 acres. The indicated 1943 acreage of these types expressed as percentages of allotments were 83.7 and 90.1, respectively.

Supplies Low in Relation to Demand

Domestic production of all dark tobaccos in 1943 is estimated at about 95 million pounds, 10 percent below 1942 and 32 percent less than the 1935-39 average. Stocks on October 1, 1943, are expected to be smaller than on the corresponding date last year. The current season's production, together with the estimated carry-over of 239 million pounds, gives an available supply at the beginning of the season of slightly more than 334 million pounds, 12 percent under the 1935-39 average. The trend in demand

for and consumption of dark tobaccos has been downward for several years, due primarily to a decline in exports. Disappearance in the 1942 season was considerably larger than production, and next year the margin between the two is expected to be still greater. This condition is due to a substantial increase in the consumption of products made from these tobaccos and to the increased use of the leaf in the manufacture of tobacco byproducts, particularly insecticides.

Low Grades Reserved for Manufacture of Insecticides

Since April 1942 the Department of Agriculture has had in operation a program the purpose of which is to divert low-grade dark tobacco to the production of nicotine alkaloid and nicotine sulphate. Due to wartime necessity, the Department has undertaken to greatly increase the domestic supplies of these insecticides, vitally needed for food production. Due to shipping difficulties, the principal foreign sources of insecticide bases have been cut off. On January 21 the Secretary of Agriculture issued an order reserving certain low grades of the 1942 crop of types 22, 23, and 36 for use in the manufacture of these products. Under this order certain United States grades were specified which could be sold only to manufacturers of nicotine sulphate and nicotine alkaloid. It further provided that tobacco of these grades bought other than on auction floors and purchased by buyers other than by-product manufacturers must be resold to such manufacturers.

In order to make possible the production and sale of these products under established price ceilings the Government is subsidizing manufacturers under supervision of the Food Distribution Administration. Payments are made at a rate equal to the difference between the price the manufacturer pays for leaf and 3-1/2 cents per pound for tobacco of types 21, 22, 23, 24, and 36, except that the rate may not exceed 12-1/2 cents per pound. For other types the rate is equal to the difference between the purchase price and 2-1/2 cents per pound, and the maximum payment is 12-1/2 cents.

Domestic Consumption of Snuff and Chewing Tobacco Continues to Increase

The principal domestic trade outlet for the dark tobaccos produced in this country is in the manufacture of snuff and chewing tobacco, the consumption of which has increased under war conditions. Tax-paid withdrawals of snuff, the principal product made from the fire-cured types, has shown substantial increases over pre-war years. During the first 7 months of 1943 withdrawals totaled 25.7 million pounds, 4 percent greater than for the same period in 1942. Increased farm income, particularly from cotton, is in part responsible for the increased consumption of chewing tobacco and snuff. According to trade reports, sales of these products, particularly snuff, has increased considerably in the Southern States since the beginning of the war. Even though the sales of chewing tobacco and snuff in recent years have been rather stable, and the possibility of substituting one brand for another rather slight, there is a tendency for consumption to increase as farm income increases.

Production of chewing tobacco (plug and twist), the principal trade outlets for dark air-cured, has shown increases for each month during the past year over the same month of the preceding year. Production of plug was 24.2 million pounds for the first 5 months of 1943 as compared with 20.8 million in the corresponding period of 1942, an increase of 16.3 percent. Similar increases were shown for twist during this period. Consumption of this product will probably continue at a relatively high rate for the remainder of the year, but it does not appear to represent a reversal of the long-time downward trend in the use of chewing tobacco.

CIGAR TOBACCOS, TYPES 41-62

Smaller 1943 Acreage and Production Indicated, Stocks Below Normal

The 1943 harvested acreage of all types of cigar tobaccos is expected to be 81,700 acres, 8.7 percent below last year and 86 percent of the year's allotments. In general, weather conditions have been favorable in most areas and the per acre yield of 1,334 pounds, just under last year, is 6 percent above the 5-year (1935-39) average production.

The total 1943 cigar leaf crop grown in the continental United States is expected to be 109 million pounds, 10 percent less than the 121-million-pound crop grown last season, but only 4.4 percent under the 10-year average (1932-41). Although declines were general for the several types and in all areas where the crop is grown, the largest occurred in the Georgia-Florida sun-grown area. The only types to show greater production than last year are cigar wrappers, types 61 and 62, which increased 16 and 31 percent, respectively. Indicated 1943 production is 20 percent less than 1942 estimated disappearance of 137.3 million pounds, whereas the 1942 crop was 88 percent of 1941 disappearance.

Stocks of foreign-grown cigar leaf held in the United States on July 1 of 19.6 million pounds were approximately the same as the preceding year. Stocks of Cuban tobacco were larger, having increased almost 24 percent over January 1. Holdings of Sumatra and Java tobaccos were slightly lower, and Philippine stocks in this country are almost non-existent.

Tax-Paid Withdrawals of Cigars Decline

Tax-paid withdrawals of large cigars during the fiscal year ended June 30, 1943, was 6,003 million, compared with 6,103 a year earlier and 5,708 million in 1941. Also, total withdrawals (all classes) during the first 8 months of this year were 9 percent below the corresponding period a year ago. In recent months there has been a definite trend toward higher priced cigars. For August 1943, tax-paid withdrawals for those classes made to sell not over 8 cents was 26 percent below the same month of 1942, while all the higher priced classes showed increases. According to trade reports, the increased demand for cigars, particularly those in the higher priced categories, has made it increasingly difficult for dealers to maintain normal supplies.

Table 4.- Cigar leaf tobacco: Production, stocks, supply, and price,
United States, 1920-43

(Data for neg. 26055)				
Year	Production	Stocks Oct. 1	Supply	Season average
beginning:		(farm-sales		farm price
Oct.		weight) 1/		per pound
	Million	Million	Million	Cents
	pounds	pounds	pounds	
1920	223.6	360.9	584.5	22.2
1921	212.9	369.2	582.1	17.6
1922	172.6	415.7	588.3	21.5
1923	192.2	430.5	622.7	24.6
1924	180.1	448.0	628.1	19.2
1925	194.4	425.8	620.2	15.8
1926	146.5	420.3	566.8	19.1
1927	139.0	356.2	495.2	21.8
1928	162.9	322.9	485.8	20.7
1929	170.8	322.2	493.0	20.1
1930	180.8	313.7	494.5	15.9
1931	187.7	358.0	545.7	10.2
1932	150.0	427.4	577.4	7.8
1933	78.4	413.7	492.1	11.0
1934	75.1	392.3	467.4	16.8
1935	91.5	362.0	453.5	17.0
1936	104.4	325.4	429.8	19.4
1937	110.6	302.1	412.7	18.1
1938	114.3	296.6	410.9	15.4
1939	137.7	269.4	407.1	18.7
1940	144.0	298.7	442.7	17.4
1941	143.2	305.4	448.6	20.4
1942	121.3	317.3	438.6	23.5
1943	2/ 109.0			

Compiled from data of the Food Distribution Administration. Stocks prior to 1929 compiled from reports of the Bureau of the Census, Department of Commerce.

1/ Stocks of continental types held by dealers and manufacturers. Complete data on farm stocks which are significant in some years and for some cigar types are not available. Stocks for types 45 and 62 are as of July 1.

2/ September 1 indications.

Table 5.- Acreage and production of tobacco in the United States,
by types, 1942 and 1943

Type	Acreage			Production		
	1942	1943	1/2 Change	1942	1943	1/2 Change
	1,000 acres	1,000 acres	Percent	Million pounds	Million pounds	Percent
Total flue-cured, types 11-14	792.7	838.8	5.8	811.7	778.3	- 4.1
Old and Middle Belt, type 11	294.0	316.0	7.5	279.3	268.9	- 3.7
Eastern North Carolina, type 12 ...	266.0	282.0	6.0	295.3	284.8	- 3.6
South Carolina, type 13	151.0	155.0	2.6	166.9	147.3	-11.7
Georgia and Florida, type 14	81.7	85.8	5.0	70.2	77.3	10.1
Total fire-cured, types 21-24	72.3	75.3	4.1	70.0	64.3	- 8.1
Virginia, type 21	13.6	14.0	2.9	13.3	11.2	-15.8
Kentucky and Tennessee, type 22 ...	40.0	41.8	4.5	38.7	36.5	- 5.7
Kentucky and Tennessee, type 23 ...	18.5	19.3	4.3	17.8	16.4	- 7.9
Henderson, type 24	0.2	0.2	2/ .0	0.2	0.2	2/-15.5
Burley, type 31	350.7	405.0	15.5	343.2	371.3	8.2
Maryland, type 32	39.5	35.5	-10.1	31.0	17.8	-42.6
Total dark air-cured, types 35-37 ...	34.0	34.7	2.1	35.2	30.8	-12.5
One Sucker, type 35	16.8	17.5	4.2	17.9	16.0	-10.6
Green River, type 36	14.5	14.5	.0	14.9	12.7	-14.8
Virginia sun-cured, type 37	2.7	2.7	.0	2.4	2.1	-12.5
Total cigar filler, types 41-45	43.8	39.3	-10.3	57.5	49.3	-14.3
Pennsylvania Seedleaf, type 41 ...	34.0	32.0	- 5.9	45.6	41.6	- 8.8
Miami Valley, types 42-44	9.8	7.3	-25.5	11.9	7.7	-35.3
Total cigar binder, types 51-55	36.1	33.0	- 8.6	55.3	50.2	- 9.2
Connecticut Valley Broadleaf, type:						
51	6.8	6.2	- 8.8	10.3	9.6	- 6.8
Conn. Valley Havana Seed, type 52 :	7.4	6.7	- 9.5	12.4	11.4	- 8.1
N.Y. and Pa. Havana Seed, type 53 :	1.3	0.9	-30.8	1.9	1.2	-36.8
Southern Wisconsin, type 54	9.2	8.9	- 3.3	13.8	12.9	- 6.5
Northern Wisconsin, type 55	10.6	9.9	- 6.6	16.1	14.7	- 8.7
Ga. and Fla., sun-grown, type 56 ..	0.8	0.4	-50.0	0.8	0.4	-50.0
Total cigar wrapper, types 61-62 ...	9.6	9.4	- 2.1	8.4	9.5	13.1
Conn. Valley shade-grown, type 61 :	6.1	6.4	4.9	4.8	6.3	31.3
Ga. and Fla. shade-grown, type 62 :	3.5	3.0	-14.3	3.6	3.2	-11.1
Total Miscellaneous	0.2	0.2	2/ .0	0.1	0.1	2/ 28.
Louisiana Perique	0.2	0.2	2/ .0	0.1	0.1	2/ 28.
Total all types	1,378.9	1,471.2	6.7	1,412.4	1,371.6	- 2.9

1/ Acreage for harvest as of July 1; production indicated September 1.

2/ Based on actual, not rounded, figures.

Table 6.- Tobacco: Average yield per acre, by types,
in the United States, 1920-43

Year	Flue-	Burley	Mary-	Fire-cured				Dark air-cured			All
	cured:	type	land	Type	Type	Type	Type	Type	Type	Type	cigar
	types:	31	32	21	22	23	24	35	36	37	types
	11-14	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.
Av. 1920-24:	639	824	783	731	781	805	855	826	856	726	1,175
1920	678	789	875	780	766	780	820	819	796	755	1,250
1921	587	754	715	611	795	828	855	843	881	579	1,277
1922	630	857	770	811	763	810	893	859	893	770	1,118
1923	722	872	792	795	785	810	880	827	880	775	1,182
1924	580	849	765	660	798	795	825	782	830	750	1,048
Av. 1925-29:	698	798	778	761	784	780	783	808	778	784	1,192
1925	689	806	823	751	767	776	775	806	850	795	1,270
1926	699	832	840	793	810	799	896	905	851	802	1,173
1927	750	731	818	800	749	748	646	722	649	821	1,152
1928	660	816	660	703	753	739	750	760	700	692	1,182
1929	691	807	750	760	842	840	850	849	840	810	1,182
Av. 1930-34:	731	782	677	720	812	759	787	811	824	660	1,139
1930	756	740	560	615	757	700	745	784	785	585	1,170
1931	684	845	730	765	812	804	800	796	880	650	1,228
1932	605	740	775	640	794	779	775	801	825	545	1,139
1933	797	753	600	760	801	657	740	783	740	720	1,120
1934	814	831	720	820	895	856	875	893	890	800	1,289
Av. 1935-39:	874	838	769	810	806	796	829	834	838	844	1,276
1935	928	792	775	870	821	795	840	835	845	900	1,295
1936	790	727	820	770	805	761	730	730	700	780	1,337
1937	875	907	650	790	846	817	850	908	900	785	1,223
1938	861	833	780	710	709	784	875	785	870	780	1,177
1939	916	930	820	910	851	824	850	911	875	975	1,347
1940	1,025	1,042	850	835	925	884	850	927	875	925	1,380
1941	905	987	775	895	950	929	900	978	975	850	1,438
1942	1,024	979	785	975	969	962	900	1,064	1,030	900	1,355
1943 1/	928	917	500	800	873	850	825	916	875	780	1,334

Compiled, 1920-34, from First Annual Report on Tobacco Statistics, Statistical Bulletin No. 58; 1935-38, Annual Report on Tobacco Statistics, 1940; 1939-43, General Crop Reports.

1/ Indicated September 1.

Table 7.- Season average prices per 100 pounds of flue-cured tobacco, by grades, on representative markets, 1942-43

				Type 12			
U. S.	Crop of -			U. S.	Crop of -		
standard	1942	1943	Change	standard	1942	1943	Change
grade 1/	2/	2/		grade 1/	2/	2/	
	Dollars	Dollars	Percent		Dollars	Dollars	Percent
Leaf:				Lugs:			
B2L	48.00	---	---	X1L	47.00	44.00	- 6.4
B3L	48.00	45.00	- 6.3	X1F	47.00	44.00	- 6.4
B2F	48.00	45.00	- 6.3	X2L	47.00	44.00	- 6.4
B3F	47.00	44.00	- 6.4	X2F	46.00	44.00	- 4.3
B4L	47.00	44.00	- 6.4	X3L	46.00	43.00	- 6.5
B4F	46.00	43.00	- 6.5	X3F	45.00	43.00	- 4.4
B4R	42.00	41.00	- 2.4	X3GL	38.00	---	---
B4GL	41.00	---	---	X3GF	35.00	---	---
B4GF	40.00	---	---	X4L	43.00	42.00	- 2.3
B5L	45.00	43.00	- 4.4	X4F	43.00	41.00	- 4.7
B5F	43.00	42.00	- 2.3	X4GL	32.00	35.00	+ 9.4
B5R	38.00	38.00	0	X4GF	30.00	30.00	0
B5GL	37.00	38.00	+ 2.7	X5L	38.00	40.00	+ 5.3
B5GF	34.00	35.00	+ 2.9	X5F	36.00	38.00	+ 5.6
B6L	40.00	41.00	+ 2.5	X5GF	21.00	---	---
B6F	35.00	39.00	+11.4	Primings:			
B6R	28.00	31.00	+10.7	P1L	46.00	44.00	- 4.3
B6GL	29.00	31.00	+ 6.9	P1F	46.00	---	---
B6GF	25.00	27.00	+ 8.0	P2L	45.00	44.00	- 2.2
Smoking leaf:				P2F	45.00	43.00	- 4.4
H3F	47.00	44.00	- 6.4	P3L	44.00	43.00	- 2.3
H4F	46.00	43.00	- 6.5	P3F	43.00	42.00	- 2.3
H5F	44.00	42.00	- 4.5	P3G	32.00	36.00	+12.5
H5R	42.00	41.00	- 2.4	P4L	39.00	41.00	+ 5.1
H6F	39.00	40.00	+ 2.6	P4F	37.00	40.00	+ 8.1
H6R	35.00	37.00	+ 5.7	P4G	24.00	29.00	+20.8
Cutters:				P5L	31.00	38.00	+22.6
C2L	49.00	---	---	P5F	27.00	35.00	+29.6
C3L	48.00	46.00	- 4.2	P5G	18.50	22.50	+21.6
C3F	48.00	---	---	Nondescript:			
C4L	48.00	45.00	- 6.3	N1G	14.25	16.50	+15.8
C4F	48.00	45.00	- 6.3				
C5L	47.00	44.00	- 6.4				
C5F	47.00	44.00	- 6.4				

Continued -

Table 7.- Season average prices per 100 pounds of flue-cured tobacco, by grades, on representative markets, 1942-43 - Continued

Type 13							
U. S.	Crop of -			U. S.	Crop of -		
standard	1942	1943	Change	standard	1942	1943	Change
grade 1/	2/	2/		grade 1/	2/	2/	
	Dollars	Dollars	Percent		Dollars	Dollars	Percent
Leaf:				Lugs:			
B2L	46.00	47.00	+ 2.2	X1L	45.00	45.00	0
B3L	45.00	45.00	0	X1F	45.00	44.00	- 2.2
B3F	44.00	44.00	0	X2L	44.00	44.00	0
B3GL	36.00	----	----	X2F	44.00	43.00	- 2.3
B4L	43.00	44.00	+ 2.3	X3L	42.00	43.00	+ 2.4
B4F	40.00	43.00	+ 7.5	X3F	41.00	42.00	+ 2.4
B4R	36.00	----	----	X3GL	32.00	----	----
B4GL	33.00	40.00	+21.2	X3GF	29.00	----	----
B4GF	31.00	36.00	+16.1	X4L	39.00	42.00	+ 7.7
B5L	39.00	42.00	+ 7.7	X4F	36.00	41.00	+13.9
B5F	35.00	41.00	+17.1	X4GL	24.50	----	----
B5R	31.00	37.00	+19.4	X4GF	23.50	----	----
B5GL	27.00	36.00	+33.3	X5L	31.00	40.00	+29.0
B5GF	24.50	32.00	+30.6	X5F	27.00	38.00	+40.7
B6L	31.00	38.00	+22.6	X5GL	20.00	----	----
B6F	27.00	35.00	+29.6	X5GF	17.00	----	----
B6R	22.50	25.00	+11.1	Primings:			
B6GL	18.50	29.00	+56.8	P1L	44.00	44.00	0
B6GF	17.00	24.00	+41.2	P1F	44.00	----	----
Smoking leaf:				P2L	43.00	43.00	0
H2F	46.00	45.00	- 2.2	P2F	43.00	43.00	0
H3F	45.00	44.00	- 2.2	P3L	41.00	42.00	+ 2.4
H4F	43.00	43.00	0	P3F	40.00	42.00	+ 5.0
H5F	39.00	42.00	+ 7.7	P4L	37.00	42.00	+13.5
H5R	36.00	39.00	+ 8.3	P4F	35.00	41.00	+17.1
H6F	31.00	39.00	+25.8	P4G	26.00	----	----
H6R	26.00	30.00	+15.4	P5L	28.00	40.00	+42.9
Cutters:				P5F	25.00	38.00	+52.0
C3F	46.00	46.00	0	Nondescript:			
C2L	47.00	48.00	+ 2.1	N1G	9.75	16.50	+69.2
C3L	46.00	47.00	+ 2.2	N2G	6.25	----	----
C4L	45.00	45.00	0				
C4F	45.00	45.00	0				
C5L	44.00	44.00	0				
C5F	43.00	44.00	+ 2.3				

Continued -

Table 7.- Season average prices per 100 pounds of flue-cured tobacco, by grades, on representative markets, 1942-43 - Continued

Type 14 3/							
U.S. standard : grade 1/	Crop of - 1942	1943 2/	Change	U.S. standard : grade 1/	Crop of - 1942	1943 2/	Change
	Dollars	Dollars	Percent		Dollars	Dollars	Percent
Leaf:				Lugs: Contd.			
B2L	41.00	45.00	+ 9.8	X4L	35.00	41.00	+ 17.1
B3L	39.00	44.00	+ 12.8	X5L	28.00	40.00	+ 42.9
B4L	38.00	43.00	+ 13.2	X3LV	34.00	42.00	+ 23.5
B5L	35.00	42.00	+ 20.0	X4LV	30.00	41.00	+ 36.7
B6L	29.00	40.00	+ 37.9	X1F	39.00	44.00	+ 12.8
B3LV	36.00	43.00	+ 19.4	X2F	38.00	43.00	+ 13.2
B4LV	34.00	42.00	+ 23.5	X3F	37.00	42.00	+ 13.5
B5LV	31.00	41.00	+ 32.3	X4F	33.00	41.00	+ 24.2
B3F	38.00	43.00	+ 13.2	X5F	24.00	39.00	+ 62.5
B4F	36.00	42.00	+ 16.7	X3FV	33.00	42.00	+ 27.3
B5F	32.00	41.00	+ 28.1	X4FV	29.00	41.00	+ 41.4
B6F	23.50	38.00	+ 61.7	X3FK	32.00	---	---
B4FV	33.00	42.00	+ 27.3	X4FK	29.00	---	---
B5FV	28.00	41.00	+ 46.4	X3GL	29.00	41.00	+ 41.4
B4FK	31.00	41.00	+ 32.3	X4GL	25.00	39.00	+ 56.0
B5FK	28.00	39.00	+ 39.3	X5GL	20.00	36.00	+ 80.0
B5R	24.00	38.00	+ 58.3	X3GF	29.00	41.00	+ 41.4
B6R	17.50	31.00	+ 77.1	X4GF	24.00	39.00	+ 62.5
B4GL	31.00	41.00	+ 32.3	X5GF	18.50	35.00	+ 89.2
B5GL	26.00	40.00	+ 53.8	Primings:			
B6GL	19.50	37.00	+ 89.7	P1L	38.00	44.00	+ 15.8
B4GF	28.00	40.00	+ 42.9	P2L	37.00	43.00	+ 16.2
B5GF	24.00	39.00	+ 62.5	P3L	36.00	42.00	+ 16.7
B6GF	17.00	34.00	+100.0	P4L	32.00	41.00	+ 28.1
Smoking leaf:				P5L	23.50	39.00	+ 66.0
H3F	39.00	43.00	+ 10.3	P1F	39.00	43.00	+ 10.3
H4F	38.00	42.00	+ 10.5	P2F	37.00	43.00	+ 16.2
H5F	36.00	41.00	+ 13.9	P3F	36.00	42.00	+ 16.7
H6F	30.00	39.00	+ 30.0	P4F	31.00	41.00	+ 32.3
H6R	24.50	36.00	+ 46.9	P5F	20.50	38.00	+ 85.4
Cutters:				P3G	30.00	41.00	+ 36.7
C3L	41.00	45.00	+ 9.8	P4G	24.00	39.00	+ 62.5
C4L	39.00	44.00	+ 12.8	P5G	17.00	33.00	+ 94.1
C5L	39.00	43.00	+ 10.3	Nondescript:			
C4LV	---	---	---	N1L	12.25	30.00	+144.9
C5LV	36.00	43.00	+ 19.4	N2L	6.00	19.50	+225.0
C4F	39.00	43.00	+ 10.3	N1R	11.25	24.00	+113.3
C5F	38.00	43.00	+ 13.2	N2R	6.50	12.75	+ 96.2
C5FV	---	---	---	N1G	9.50	22.50	+136.8
Lugs:				N2G	5.25	11.75	+123.8
X1L	39.00	44.00	+ 12.8				
X2L	38.00	43.00	+ 13.2				
X3L	37.00	42.00	+ 13.5				

Compiled from Market News Reports of the Food Distribution Administration.

1/ Key to standard grade marks for flue-cured tobacco.

Group	Quality	Color	Special Factor
A - Wrappers	1 - Choice	L - Lemon	G - Green
B - Leaf	2 - Fine	F - Orange	(L) Lemon side
H - Smoking leaf	3 - Good	R - Red	(F) Orange side
C - Cutters	4 - Fair	D - Dark Red	(R) Red side
X - Lugs	5 - Low		
P - Primings	6 - Common		
N - Nondescript			

2/ Season through September 10, 1943. 3/ 1943 crop average.

Table 8.- Stocks of foreign-grown cigar, cigarette, and smoking tobacco, by types, as reported combining unstemmed and stemmed, owned by dealers and manufacturers in the United States, quarterly, 1938-42:

Year and type	Jan. 1	Apr. 1	July 1	Oct. 1
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
Total foreign-grown cigar leaf, type 80:				
1938	9,740	9,947	10,235	10,509
1939	10,418	10,571	11,350	12,577
1940	14,637	16,252	17,194	15,942
1941	15,876	17,241	19,850	19,225
1942	19,311	18,911	19,695	21,411
1943	19,949	19,642	19,695	
Cuba (Havana), type 81:				
1938	6,248	6,266	6,647	6,772
1939	5,987	6,289	6,418	6,633
1940	6,495	6,810	6,942	7,156
1941	7,139	8,140	9,215	9,800
1942	9,539	10,107	11,899	13,193
1943	12,677	13,595	16,108	
Sumatra and Java, type 82:				
1938	1,671	1,404	1,672	2,077
1939	2,247	1,879	2,494	3,021
1940	2,170	1,720	3,016	2,659
1941	2,435	3,362	5,313	5,036
1942	5,913	6,212	5,954	6,608
1943	6,027	5,135	5,658	
Philippine Islands (Manila), type 83:				
1938	1,807	2,263	1,898	1,646
1939	2,181	2,245	2,280	2,913
1940	5,969	7,654	7,164	6,054
1941	6,197	5,712	5,199	4,236
1942	3,262	2,356	1,608	1,195
1943	864	635	539	
Other foreign-grown cigar leaf, type 84:				
1938	14	14	18	14
1939	3	158	158	10
1940	3	68	72	73
1941	105	27	123	153
1942	597	236	234	415
1943	381	277	241	
Total foreign-grown cigarette and smoking tobacco, type 90:				
1938	70,366	92,396	82,603	70,228
1939	86,239	108,128	101,530	92,655
1940	116,574	118,528	112,420	106,257
1941	101,733	98,583	108,802	99,487
1942	90,621	80,858	78,435	
1943	76,794	67,989	78,435	

Compiled from quarterly stocks reports of the Food Distribution Administration.

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Table 9.- Tax-paid withdrawals of tobacco products in the United States,
 July-June 1941-42, and July-August 1942-43 ^{1/}

Products	Year beginning July			July-August		
	1941	1942	Change	1942	1943	Change
	Millions	Millions	Percent	Millions	Millions	Percent
Small cigarettes	216,905	244,828	+12.9	41,816	46,561	+ 11.3
Large cigarettes	2	4	2/+61.3	3/	1	+105.1
Large cigars	6,103	6,003	- 1.6	1,010	853	- 15.5
Small cigars	139	130	- 6.5	22	19	- 13.6
Snuff ^{4/}	41,320	41,907	+ 1.4	5,960	7,001	+ 17.5
Manufactured tobacco ^{4/}	289,648	265,813	- 8.2	46,382	42,785	- 7.8

^{1/} Tax-paid withdrawals include products from Philippine Islands and Puerto Rico. After January 1942 tax-paid withdrawals from Philippine Islands are not included.

^{2/} Based on actual, not rounded figures.

^{3/} Less than 500,000; percentage change calculated on actual figure.

^{4/} Thousand pounds.